

2007 CONSER Annual Report

Highlights

CONSER institutions have faced leadership changes, reorganization, and decreases in staff size this past year. However, the institutions and people that represent them remained committed to our cooperative cataloging program. Members faced significant and sometimes divisive challenges in implementing the CONSER standard record, a significant change in our approach to cataloging continuing resources. The new standard was implemented while program members continued to build and enhance the primary product of the CONSER Program, the CONSER database. In addition, representatives and other staff at CONSER institutions were active in the profession's working groups and organizations.

The number of bibliographic records in the CONSER database reported from CDS at the end of fiscal year 2007 is 1,122,156, an average annual growth of 2.3% over the past five years. Self reported production statistics available from <http://www.loc.gov/catdir/pcc/stats/> were down for fiscal 2007 however, a 13% decrease over last year in newly authenticated records and a 19% decrease in maintenance transactions over last year. It is interesting to note that CONSER catalogers along with their BIBCO colleagues contributed series authority records at about the same level as in FY 2006.

CONSER membership expanded with two new members in 2007, the University of Pennsylvania and Pennsylvania State University. Also worthy of highlight is the work accomplished by the University of California Libraries CONSER Funnel (UC Funnel) in training and mentoring of staff at participating UC campuses. The UC Funnel is admirable in its efforts to convey the value of cooperative bibliographic maintenance among the University of California campuses.

The Serials Cataloging Cooperative Training Program (SCCTP) continues to provide a connection for CONSER to the larger cataloging community. Most notably this year, the first SCCTP live online workshop was presented this year and represents a successful collaboration of course developers, continuing education providers, SCCTP trainers, and workshop participants. Also, several SCCTP trainers benefited from a NASIG continuing education grant to Amigos to provide online training to trainers.

CONSER Standard Record

CONSER operations representatives agreed to implement the CONSER Standard Record (CSR) on June 1, 2007. Representatives agreed to monitor the implementation of the standard throughout the year and make changes or adjustments as needed.

One full day of the CONSER Operations Meeting May 2-4, 2007 was devoted to working through the documentation for the standard and identifying areas that needed to be clarified. The [summary](#) of the meeting is available from the CONSER web site. To provide a framework for our discussions, Melissa Beck (UCLA) and Valerie Bross (UCLA) presented an SCCTP training session on the CSR developed by Melissa on behalf of the PCC. The session outlined the record element requirements, special instructions and record examples in the CSR [Metadata Application Profile](#) (MAP). After the session, members discussed cataloging questions that were not

clearly addressed in the documentation or that required further decision-making by the group.

Representatives agreed that the next steps include formally charging a CONSER group to monitor the standard and suggest revisions for the MAP and other CONSER documentation. We plan to have this group formally charged and in operation this fall. A summary of unresolved issues is being maintained on a portion of the PCC wiki and representatives have been making comments, suggestions, and offering rule of thumb decision making tools throughout on the wiki and on the CONSER email list. Representatives met and exchanged some of their ideas at the ALA CONSER at-large meeting in June.

Hien Nguyen, CONSER specialist, developed a successful CSR poster session aimed at non-CONSER members and presented it at NASIG in May. Comments were gathered during the NASIG meeting and were incorporated into training material and the documentation. Melissa Beck led a session in conjunction with ALA Annual as an out-reach effort to non-CONSER serials catalogers on use of the standard. The SCCTP PowerPoint presentation Melissa used for this session is freely available from the CONSER web site: <http://www.loc.gov/acq/conser/issues.html#standard-rec>

The MAP is the primary documentation for the new standard and is intended to be a brief and succinct guide to cataloger decision-making. The existing *CONSER Editing Guide (CEG)* and *CONSER Cataloging Manual (CCM)* are foreseen as places where additional rules of thumb, principle-based decision-making, and information on the nature of serials publishing, etc. can be maintained. Members of the monitoring group will provide input for the revision of the *CEG* and *CCM*.

Many of the comments that CONSER representatives have offered on the CSR include suggestions for improvements in MARC21. A CONSER group has been established to draft CONSER standard related MARBI proposals. Tina Shrader (National Agricultural Library) is leading this group that includes a wide range of CONSER representatives.

Integrating Resources

In June members of CONSER and BIBCO began to authenticate records for integrating resources on OCLC and these records will soon be distributed in a single "continuing resources" file to CDS MARC Distribution Service (MDS) subscribers. Subscribers of the "MDS serials" file include several ILS vendors, providers of publication access management systems, and others services that rely on knowledge bases that cover continuing resources. CDS provided its subscribers a customary 60-day notification that the file now contains records for integrating resources. OCLC configured its account authorizations for CONSER and BIBCO member institutions to be able to add the two required elements for distributing records for integrating resources in the MDS serials file, "pcc" in the 042 field and a valid LCCN. Members of both BIBCO and CONSER can maintain records containing these two elements in the model of CONSER record updating for serials.

UC CONSER Funnel

Only one year after it was established the UC CONSER Funnel has made great strides toward establishing its own continuing resources cooperative bibliographic maintenance program. The goal is to enable interested UC campuses to obtain

training and contribute serial cataloging to the national database in OCLC. A good number of tasks in the implementation plan laid out by the UC CONSER Funnel Task Group were successfully accomplished through hard work and dedication of many staff from UCLA and UCSD, both are current and active members of CONSER. The Funnel's accomplishments include interviews with various UC campuses to determine local needs and interest in CONSER involvement, site visits, training and review, and follow-up support via mentoring of new funnel members. UC CONSER Funnel Communications Coordinator (webmaster and listowner) Renee Chin (UCSD) created an impressive communication system including the UC CONSER Funnel Web site and listserv. The Funnel Coordinator Valerie Bross (UCLA) ably administers the program's activities and documents its progresses with the help of designated campus liaisons and coordinators, trainers, and reviewers. At the request of CONSER members during its 2007 annual operations meeting, contact information for the UC CONSER Funnel liaisons has been added to the CONSER Operations Committee Web page.

Serials Cooperative Cataloging Training Program (SCCTP)

The CONSER Standard Record presentation developed by Melissa Beck has been used by SCCTP trainers as a supplemental module to the other SCCTP workshops and is freely available from the CONSER Web site. In April, Laura Kimberley, Associate Director and Manager of Continuing Education Services Amigos Library Services, helped arrange for three live online train-the-trainer sessions based on the presentation. Led by Melissa Beck and Valerie Bross, the online sessions were presented to over 20 SCCTP trainers to give them background on the new standard and the resources to incorporate the topic in other SCCTP workshops. Linda Geisler, Elmer Klebs, and Les Hawkins led face-to-face training sessions for LC serials catalogers using the training materials.

SCCTP continues to experiment with online training in asynchronous and synchronous formats. This summer, Steven Miller, Senior Lecturer, School of Information Studies University of Wisconsin--Milwaukee and author of the SCCTP Integrating Resources Workshop, offered an asynchronous version of his workshop through UWM, SOIS. Steve taught two back-to-back sessions in July and August. Each of these Web-based Integrating Resources workshops ran for four weeks. In July, through a NASIG grant to Amigos, Christine Peterson, Continuing Education Librarian at Amigos, offered a synchronous train-the-trainer workshop for SCCTP trainers using its real time online classroom Centra software. The workshop is aimed at introducing trainers to the online training environment and consists of four sessions culminating in a session of student presentations. In August, Amigos offered the SCCTP CONSER Standard Record update sessions as one of its regular for-fee live online sessions open to the entire cataloging community. In September, Bibliographical Center for Research (BCR) also offered the CSR module as one of its WebLive Training courses. Due to popular demand of this live online workshop both Amigos and BCR have planned to offer it again later this year.

Hien Nguyen and Les Hawkins facilitated a meeting of SCCTP trainers at NASIG to discuss strategies for updating the Basic Serials Cataloging and Advanced Serials Cataloging workshops. Several SCCTP trainers have volunteered to help revise the manuals. The group discussed the need to reconsider and re-purpose the content of the basic and advanced workshops. Several people expressed the need for more advanced and special-focus topics in the advanced workshop.

Les Hawkins managed the revision of the SCCTP Cataloging Integrating Resources and the SCCTP Serial Holdings workshops this year.

CONSER Participation in Task Groups

The CONSER Ad-Hoc RDA Comment Group, chaired by Kristin Lindlan (University of Washington) submitted comments on the RDA chapter 3, March 2007 revision. These comments are available from <http://www.loc.gov/acq/conser/RDA-chp-3-rev-to-cc-da.pdf>.

The PCC Ad Hoc Series Review Task Force is a joint PCC group formed in June 2007 and has been hard at work discussing to propose recommendations for a new PCC series policy. The Task Force was formed as a result of the LC series decision last year. The group's charge and membership is available from <http://www.loc.gov/catdir/pcc/archive/SeriesReviewTF.html>. Les Hawkins is co-chair of this group with Amy Turner (Duke). During a first time informal meeting at ALA Annual in 2007 the group decided to focus on one specific task: Make recommendations on changes in PCC series policies and documentation that result in simple, unified PCC policies, procedures and series authority data elements in PCC records. The group will take responsibility for vetting and submitting series related MARBI proposals and will soon be consulting the cataloging community on the MARBI proposals and other changes to series practice and policy it is considering.

The PCC Task Group on the Provider Neutral Record for Electronic Integrating Resources, finished its final report and recommendations in fiscal year 2007. The final report is available for public comment from: <http://www.loc.gov/acq/conser/ProvNeutforE-IRs-Sept-21-2007.pdf>. Les Hawkins served on this group and helped coordinate and distribute

CONSER Documentation

Update 17 of the *CONSER Editing Guide (CEG)* and update 3 of the *CONSER Cataloging Manual (CCM)* were completed in late 2006 and distributed in 2007. The *CEG* and *CCM* updates are now available as free PDF files from the Cataloging Distribution Service's Web site (<http://www.loc.gov/cds/freepdf.html>). The paper version of these updates will continue to be available by paid subscription.

CONSER Member Reports

<http://www.loc.gov/acq/conser/Members2007.pdf>

Statistics

Program for Cooperative Cataloging Statistics:
<http://www.loc.gov/catdir/pcc/stats/total07ye.pdf>

Publication Patterns statistics:
<http://www.loc.gov/acq/conser/ppp2007-total.pdf>

APPENDIX A
MEMBERS OF CONSER COMMITTEES (2006-2007)

CONSER Operations Committee

Institution	Representative
American Theological Library Assoc.	Judy Knop
Brown University	Gretchen Yealy
Center for Research Libraries	Stephen Early
Cleveland Public Library	Andrea Olson
Columbia University	Robert Rendall
Connecticut State Library	Glynis M. Georgie
Cooperative Computer Services	Roger Anderson
Cornell University	Cecilia Sercan
Harvard University	Ruth Haas
Health Sciences Library System	Liping Song
University of Pittsburgh	
Hong Kong Univ. of Sci. and Tech. Library	Ada Shuk-man Cheung
Indiana University	James Castrataro
Library and Archives Canada	John Clark
Library of Congress	Lucy Barron
Library of Congress	Les Hawkins, Coordinator
Massachusetts Institute of Technology	Jennifer Edwards
Michigan State University	Wen-Ying Lu
National Agricultural Library	Tina Shrader
National Library of Medicine	Miranda Hay
National Library of Wales	Galen Jones
National Serials Data Program	Regina Reynolds
National University	Ed Jones
New York Public Library	Edith Gewertz
New York State Library	Miriam Bogen
New York University	Everett Allgood
New York University Law Library	George Prager
Northwestern University	Kevin Randall
OCLC	Robert Bremer
Oregon State University	Mike Boock
Pennsylvania State University Libraries	Christopher Walker
St. Louis University Law Library	Margaret Smith
Saint Louis University, Pius XII Memorial Library	Anna Zaidman
Texas A&M University	Lisa Furubotten
Tulane University	Ageo Garcia

U.S. Government Printing Office	Jennifer Davis
University at Buffalo	Cindy Hepfer
University of California, Los Angeles	Valerie Bross
University of California, San Diego	Adolfo Tarango
University of Chicago	E. Renette Davis
University of Cincinnati, Medical Center Libraries	Mary Piper
University of Florida	Naomi Young
University of Georgia	Beth Thornton
University of Maryland, College Park	Jeanne Baker
University of Michigan	Leighann Ayers
University of North Carolina at Chapel Hill	Frieda Rosenberg
University of Oregon	Mary Greci
University of Pennsylvania Libraries	Shana McDanold
University of Texas at Austin	Sue Fuller
University of Washington	Kristin Lindlan
Vanderbilt University	Ann Ercelawn

Affiliate Members

Institution	Representative
Chemical Abstracts Service	Edward Gyetvai, Jr.
EBSCO Information Services	Melanie Watts
ProQuest (formerly CSA)	Alayne L. Mundt
Serials Solutions	Peter McCracken

UC CONSER Funnel Liaisons

Institution	Representative
University of California, Berkeley	Carole McEwan
University of California, Davis	Sarah Gardner
University of California, Irvine	Vicki Grahame
University of California, Santa Barbara	Elaine McCracken

Individual Members (a PCC Pilot Project)

Representative	Institution
Eugene Dickerson	U.S. Dept. of State

APPENDIX B CONSER TASK FORCES/GROUPS

Task Force on Publication Patterns and Holdings

Carlen Ruschoff (University of Maryland), Chair
John Attig (Penn State University)
John Espley (VTLS)
Jennifer Fons (EBSCO Information Services)
Rich Greene (OCLC)
Rebecca Guenther (LC)
Ruth Haas (Harvard)
Katherine Harnish (Endeavor)
Diane Hillmann (Cornell)
Martha Hruska (University of California, San Diego)
Ed Jones (National University)
Linda Miller (LC)
Frieda Rosenberg (UNC, Chapel Hill)
Les Hawkins (CONSER ex officio)

CONSER Standard Record (formerly: Access Level Record) for Serials Pilot Project

Diane Boehr (NLM), Co-chair
Regina R. Reynolds (LC), Co-chair
Bill Anderson (ILS, LC)
Melissa Beck (UCLA)
Edith Gewertz (New York Public Library)
Carolyn Larson (Science, Technology and Business Division, LC)
Kristin Lindlan (University of Washington)
Peter McCracken (Serials Solutions)
Hien Nguyen (CONSER ex officio)
Tina Shrader (National Agriculture Library)
Steve Shadle (University of Washington)
Diana Snigorowitz (Serial Record Division, LC)

Task Group to Plan for Multiple 260 Fields

Les Hawkins (CONSER Coordinator), Co-chair,
Carolyn Sturtevant (BIBCO Coordinator), Co-chair,
Robert Bremer (OCLC)
Regina Reynolds (NSDP/ISSN Network)
Cindy Hepfer (University at Buffalo)
Judy Kuhagen (CPSO, LC)
Jane Gillis (Yale)

CONSER Task Force on Coverage of E-Serials

Steve Shadle (University of Washington), Co-chair
Adolfo R. Tarango (U. of Calif. San Diego), Co-chair
James Castrataro (Indiana University)
Charlene Chou (Columbia University)
Jennifer Fons (EBSCO Information Services)
Naomi Young (University of Florida)

CONSER Ad-Hoc RDA Comment Group

Kristin Lindlan (University of Washington), Chair
Everett Allgood (NYU)
Valerie Bross (UCLA)
Renette Davis (University of Chicago)
Carroll Davis (LC)
Sue Fuller (University of Texas Libraries)
Lisa Furubotten (Texas A&M)
Les Hawkins (LC)
Jim Holmes (University of Texas)
Ed Jones (National University)
Judith Kuhagen (LC, CPSO Liaison)
Jeffrey Myers-Hayer (LC)
Hien Nguyen (LC)
Kevin M. Randall (Northwestern University)
Regina Reynolds (NSDP)
Tina Shrader (NAL)
Naomi Young (University of Florida)

CONSER URI Task Group

Valerie Bross (UCLA), Chair
Ardie Bausenbach (LC)
James Castrataro (Indiana University)
Becky Culbertson (UCSD)
Renette Davis (University of Chicago)
Rick Fitzgerald (LC)
Les Hawkins (CONSER Coordinator)
Ed Pentz (as CrossRef representative or resource)
Regina Reynolds (NSDP)
Steve Shadle (University of Washington)

CONSER Ad-hoc Task Group Making Recommendations for the Registry of Digital Masters

Diane L. Boehr (NLM)
Robert Bremer (OCLC)
Renette Davis (University of Chicago)
Lisa Furubotten (Texas A&M)
Les Hawkins (LC)
Dave Reser (LC)

Steve Shadle (University of Washington)
Naomi Young (University of Florida)

Task Group on FRBR and Continuing Resources

Everett Allgood (NYU), Co-chair
Ed Jones (National University), Co-chair
John Attig (Penn State University)
Robert Bremer (OCLC)
Valerie Bross (UCLA)
E. Ann Caldwell (Brown)
Les Hawkins (LC), CONSER ex officio
Carroll Nelson Davis (LC)
Ann Sitkin (Harvard Law)
Naomi Young (University of Florida)

**PCC WORKING GROUP ON AUTHENTICATION CODES AND
ENCODING FOR SERIALS AND INTEGRATING RESOURCES**

Diane Boehr (National Library of Medicine), Co-chair, and PCC
Standing Committee on Standards representative
Regina Romano Reynolds (Library of Congress), Co-chair
Mechael Charbonneau (PCC ex officio)
Leslie Hawkins (CONSER ex officio)
Melissa Beck (UCLA)
Robert Bremer (OCLC)
Renette Davis (University of Chicago)
Greta de Groat (Stanford University)
Rebecca Guenther (Library of Congress, Network Development and
MARC Standards Office)
Kate Harcourt (Columbia University)
Mary Charles Lasater (Vanderbilt University)
John Levy (Library of Congress)
Dave Reser (Library of Congress, CPSO)
Steve Shadle (University of Washington)
Tina Shrader (National Agricultural Library)